

# Adobe Writer Version 7, 8, and 9 Instructions

## Forms to be digitally signed

- Design Exception/Design Waiver/Deviation from Standards Form
- Other forms created for digital signatures using these same setup instructions

## Testing

- Compatibility was tested for Adobe 8 Pro with Adobe 7 Pro and Adobe 8 Reader. The latest testing was done for Adobe 9 Pro with Adobe 8 Pro, Adobe 8 Reader, and Adobe 9 Reader. No direct testing done for Adobe 9 Pro with Adobe 7 Pro.
- LiveCycle Designer ES 8 that comes with Adobe 9 Pro can set target for Acrobat and Adobe Reader 7 or later if needed. Target can also be set for version 8 or later or version 9 or later. Issues with using the version 7 or later option covered during Adobe 9 form setup.
- No testing was done for Reader 7 for any options as upgrading to the current version is free. Highly recommend the use of Reader 9.

## Version requirements and applicability:

- To add Signature Fields
  - ◆ Adobe Writer 8 Pro
  - ◆ Adobe Writer 9 Pro
- To sign as Certifying Official
  - ◆ Adobe Writer 8 Pro
  - ◆ Adobe Writer 9 Pro
- To sign other than Certifying Official
  - ◆ Adobe Writer 7 Pro (Tested with 8 Pro, not 9 Pro)
  - ◆ Adobe Writer 8 Pro
  - ◆ Adobe Writer 9 Pro
  - ◆ Adobe Reader 8
  - ◆ Adobe Reader 9

All personnel digitally signing forms begin here.

### **Certificate and eToken setup**

- Accomplish these initial steps well in advance of needing to digitally sign your first document.
  - ◆ Obtain and install an electronic certificate. Refer to the following link for more information. Certificate renewal instructions also available at this location. Highly recommend using an eToken for installation of the electronic certificate instead of installation directly to a PC. This makes the certificate portable and compatible with PC/Laptop upgrades.  
Link: <http://www.udot.utah.gov/go/digitalsignature>
  - ◆ Setting up a signature graphic
    - Sign your name on a blank piece of white paper (use upper left portion of paper)
    - Scan or have someone scan the image as a transparent gif file
    - Create a subdirectory on your hard drive or a network drive named as desired. For example: DigitalSignatureFiles
    - Save image to this location

### **Initial Adobe Writer set up for 8 Pro or 9 Pro**

(If done skip to “[Continue here when ready for your project](#)” on page 4 if Preparer or page 8 “[Signing the document.](#)”)

- Open Adobe Writer
  - ◆ Click “Edit” menu
  - ◆ Select “Preferences”
  - ◆ From “Categories” on the left side of the dialog box scroll and select “Security”
  - ◆ Check “Verify signatures when document is opened”
  - ◆ In “Appearance” area select “New”
  - ◆ In “Title” area enter “Digital Signatures-abc” (For “abc” substitute your name. This allows another user to set up this item from the same PC.)
  - ◆ In “Configure Graphic” area
  - ◆ Click “Import Graphic”
  - ◆ Click “File”
  - ◆ Browse to the location where you saved your scanned signature gif file
  - ◆ From “Type of Files” select gif option
  - ◆ Select your signature file and click “Select” (sample should display on next screen)
  - ◆ Click OK
  - ◆ In “Configure Text” area verify all “Show” options are selected (should be on by default, check those that are not)

- ◆ In “Text Properties” area verify “Auto” is selected (should be default, check if not)
- ◆ Click “OK”
- ◆ Select the “Advanced Preferences” option
- ◆ From the “Verification” tab
- ◆ Select or verify that
  - The first “Use the document-specific method” is selected
  - “Require certificate revocation...” is checked
  - “Secure time...” is marked
- ◆ Select the “Creation” tab
  - Select the “Show reasons when signing” option
  - For “Enable Reviewing of Document Warnings” option select “Always”
  - For “Prevent Signing Until...” option select “Never”
- ◆ Click “OK” and Click “OK”

**(Note:** you can use this Initial set up any time to create a new signature type (with a different name) or if needed to check/modify your settings)

Continue here when ready for your project.

**These instructions are written specifically for the Design Exception Process but can be used accordingly for any document requiring a digital signature.**

#### **Preparer**

**Preparer continue, all others to digitally sign a project or form skip to [“Signing the document.”](#)**

- Download latest “Design Exception/Design Waiver/Deviation from Standards” form from the Web site or use your own file if creating another form type.  
Link: <http://www.udot.utah.gov/go/designexceptionprocess>
- Open File in MS Word
  - ◆ Enter required data for your project and save
  - ◆ Do not change any formatting in the form or bold any items
- Convert to Adobe PDF file from Word (Use button on toolbar or from the Adobe PDF menu select “Convert to Adobe PDF.” (Do not use the print option to print using the Adobe PDF printer driver. This option has not been tested.)
- Add all supporting documentation to PDF file
  - ◆ Insert PDF files at the end of the file just created.
  - ◆ After inserting all additional PDF files the file needs to be compressed.
  - ◆ Accomplish a “Save As” with the same file name to compress.
- Once the following steps are accomplished to create a form and add “Document Signature Fields” no additional pages can be added. The entire package must be complete before continuing.

#### **Form Creation**

**Adobe 8 Pro Users continue here. [Adobe 9 Pro Users skip to the Adobe 9 Pro steps.](#)**

#### **Adobe 8 Pro steps**

- Open PDF file
  - ◆ Check file. If the file looks alright continue with next step. If not, correct in Word and recreate the PDF file and add supporting documentation.
- Click “Forms” menu

- ◆ Select “Create New Form”
  - ◆ Select “Start with an electronic document” and click Continue
  - ◆ Review dialog box and if desired select the “Do not show again” option and click Continue. (If selected the next time you complete this process this item will not apply.)
  - ◆ Select “Use the current document” and click Next
  - ◆ Select “Place Field By Hand” and click Next
  - ◆ Click Done
- Adobe LiveCycle Designer process automatically begins
    - ◆ Uncheck “Add an email button.”
    - ◆ Uncheck “Add a print button.” (You can leave this one if you want.)
    - ◆ Click Finish
- The LiveCycle Designer 8 with the PDF file opens.
- Add Signature Fields as follows (**Do not add any other fields to your document.**)
    - ◆ Maximize Window if not already maximized.
    - ◆ Scroll to the top of the signature page so that all signature areas are displayed.
    - ◆\* In the right Library screen, Standard tab scroll to find the “Document Signature Field” option.
    - ◆\* Click and then go to the first or next signature area.
    - ◆\* Put cursor in desired top left location starting just below the previous line of text or the solid line, click and hold left mouse button and drag to desired end location to fill the entire signature area stopping just above the solid line.
    - ◆ Select “View” menu and check Field Editor.
    - ◆ Right click in center of field just created and select Palettes and Objects if “Object” view is not displayed below the Library screen.
    - ◆\* In the “Document Signature” tab uncheck the “Lock Fields After Signing” or verify it is unchecked. This item can not be checked or signing the PDF file after the signature field will not be available.
    - ◆ Repeat the “\*” steps above to add all signature fields and check the object requirement.
- Save the form with appropriate file name (not the same file name used to start the process) to the desired location. By not using the same file name you have a copy of the original PDF file without Signature Fields in case a problem is encountered at some point. The original PDF file can still be created from the Word file but this saves a little time.
- Close LiveCycle Designer (This is the only time you have to use LiveCycle Designer for anything related to this Process.)

## Enabling signatures for use in Adobe Reader

- Open the file just saved with the signature fields in Adobe 8 Pro.
  - ◆ Click on the Advanced menu
  - ◆ Select “Enable Usage Rights in Adobe Reader”
  - ◆ Save the file

## Adobe 9 Pro actions

**Adobe 9 Pro Users continue here.**

The process to create a form with signature fields can be started two ways, from Adobe 9 Pro or directly from [LiveCycle Designer ES](#).

## Adobe 9 Pro steps

- Open PDF file
  - ◆ Check file. If the file looks alright continue with next step. If not correct in Word and recreate the PDF file and add supporting documentation.
- Click “Forms” menu
  - ◆ Select “Add or Edit Fields.”
    - “Start From Wizard” does not meet UDOT needs
    - When asked “Currently there are no form fields in the PDF. Do you want Acrobat to detect form fields for you” select “No.”
  - ◆ Form opens with left pane showing a bookmark for each page. Select the signature page, possibly page 8. This depends on the size of the document. If the wrong page comes up use the page up (↑) or down (↓) arrows to locate the correct page.
  - ◆ On the Tool Bar, click the “Add New Field” button and select “Digital Signature.”
  - ◆ Move mouse to approximate top, left area for the first signature field. Left click to set box.
  - ◆ Left click and hold mouse button on the lower right corner of the signature field. Drag to desired location and release. Re-size box as needed.
  - ◆ Right click mouse in interior of signature field.
  - ◆ Select “Place Multiple Fields.”
  - ◆ Six more fields are needed. In “Number of Fields” area, “Copy selected fields down,” type a “7.”
  - ◆ Click OK.
  - ◆ Starting with the lower most signature field and working up, drag each box to the next lower area requiring a signature until complete.

- ◆ Save As with desired file name.
- ◆ [Skip to step to extend features to Adobe Reader.](#)

## LiveCycle Designer ES steps

- Open LiveCycle Designer ES
  - ◆ File, Open or Open button to open required PDF file.
  - ◆ From “New Form Assistant” check the “Create an Interactive Form with Fixed Pages” option.
  - ◆ Click “Next.”
  - ◆ Uncheck “Add an email button.”
  - ◆ Uncheck “Add a print button.” (You can leave this one if you want.)
  - ◆ Click Finish
  - ◆ When conversion is complete check file. If the file looks alright continue with next step. If not correct in Word, recreate the PDF file, and add supporting documentation.
  - ◆ Check and set as required the Target Adobe version.
    - File, Form Properties, Defaults tab
    - From Target Version, verify Acrobat and Adobe Reader 7.0.5 or later is selected. Select as required.
    - Click OK.
  - ◆ Press CTRL, End keys to get to end of document.
- Add Signature Fields as follows (**Do not add any other fields to your document.**)
  - ◆ Maximize Window if not already maximized.
  - ◆ Scroll to the top of the signature page so that all signature areas are displayed.
  - ◆\* In the right Library screen, Standard tab scroll to find the “Signature Field” option.
  - ◆\* Click and then go to the first or next signature area.
  - ◆\* Put cursor in desired top left location starting just below the previous line of text or the solid line, click and hold left mouse button and drag to desired end location to fill the entire signature area stopping just above the solid line.
  - ◆ Select “View” menu and check Object Editor if not checked.
  - ◆ Right click in center of field just created and select Palettes and Objects if “Object” view is not displayed below the Library screen.
  - ◆\* In the “Document Signature” tab uncheck the “Lock Fields After Signing” or verify it is unchecked. This item can not be checked or signing the PDF file after the signature field will not be available.
  - ◆ Repeat the “\*” steps above to add all signature fields and check the object requirement. Review the following note before continuing.
    - Note: When the second and subsequent fields are placed a “Target Warning Box” notice will appear if the Target set above was for “Acrobat and Adobe Reader 7.0.5 or later.” This warning comes

up but the functionality of the form is not impacted. Click OK. This same information will come up during the SAVE process. Click OK.

- Save the form with appropriate file name (not the same file name used to start the process) to the desired location. By not using the same file name you have a copy of the original PDF file without Signature Fields in case a problem is encountered at some point. The original PDF file can still be created from the Word file but this saves a little time.
- Close LiveCycle Designer (This is the only time you have to use LiveCycle Designer for anything related to this Process.)

#### Extending Features in Adobe Reader

- Open the file just saved with the signature fields in Adobe 9 Pro.
  - ◆ Click on the Advanced menu
  - ◆ Select “Extending Features in Adobe Reader”
  - ◆ Save the file with new file name
- Close Adobe

#### **Continue when ready to begin the signing process**

#### **Certifying and Signing the Document**

##### **For the Preparer**

- Open the completed form in Adobe Writer 8 Pro or 9 Pro
- Go to the Signature Page
- Right Click in the first Signature Field (A regular left click will not give you the option to Certify the document, just sign. The Certify option is only available to the first signer, thereafter right and left click provide the same option, sign only. Adobe Reader does not allow the Certify option.)
  - ◆ Select the “Certify with Visible Signature” option to Digitally Sign the form
  - ◆ From “Digital ID” select your name. (Other names may be here if the same PC is being used by more than one person to digitally sign.)
  - ◆ From the drop down “Appearance” select “Digital Signatures-your name” that you previously created.
  - ◆ From “Reason” select “I am approving this document” or “I attest to the accuracy and integrity of this document” as desired.



- ◆ From “Permitted Changes after Certifying” select “Form fill-in and digital signatures.”
    - This option must be selected so all changes other than adding further signatures are prevented.
  - ◆ Click “Sign”
  - ◆ Complete the signature process and Save
- Close document, email or electronically transfer to the next person.
    - ◆ If using the same PC for the next signature, contact the next signer to advise them that the form is ready for signature.

**Continue on the next page**

## Signing the Document

**For remaining personnel (Project Manager, Region Preconstruction Engineer, and if required Region Director)**

- Accomplish [“certificate and eToken set up”](#) and [“Adobe Initial”](#) actions starting on Page 2 if not already accomplished before continuing.
  - ◆ Skip if already accomplished
- If required “Save” the file from email or other method to desired location and open in Adobe Writer Pro 7, 8, or 9 or Adobe Reader 8 or 9.
- Click in the required Signature Field.
  - ◆ From “Digital ID” select your name. (Other names may be here if the same PC is being used by more than one person to digitally sign.)
  - ◆ From “Appearance” select “Digital Signatures” that you created above.
  - ◆ From “Reason” select “I am approving this document” or “I attest to the accuracy and integrity of this document” as desired.
    - The “Reason” option may not be available for those using Reader to sign.
  - ◆ Click “Sign” to Digitally Sign the form.
  - ◆ Save.
- Email or electronically transfer to the next person.
  - ◆ If using the same PC for the next signature contact the next signer to advise them that the form is ready for signature.
- Repeat actions on this page of the process for remaining required signatures until region signing actions are complete.
- Email or electronically transfer to the Complex, Preconstruction area. (Currently Robert Miles and Patrick Cowley. **Do not send to Traffic and Safety, Robert or Patrick will do this after logging the receipt of the form.**)

**Continue on the next page**

**Department Preconstruction Engineer**

- Complete required process
- Email or electronically transfer to Traffic and Safety

**Traffic and Safety**

- Accomplish [“certificate and eToken set up”](#) and [“Adobe Initial”](#) actions starting on Page 2 if not already accomplished before continuing.
  - ◆ Skip if already accomplished
- If required “Save” the file from email or other method to desired location and open in Adobe Writer Pro 7, 8, or 9 or Adobe Reader 8 or 9.
- Click in the required Signature Field.
  - ◆ From “Digital ID” select your name. (Other names may be here if the same PC is being used by more than one person to digitally sign.)
  - ◆ From “Appearance” select “Digital Signatures” that you created above.
  - ◆ From “Reason” select “I am approving this document” or “I attest to the accuracy and integrity of this document” as desired.
    - The “Reason” option may not be available for those using Reader to sign.
  - ◆ Click “Sign” to Digitally Sign the form.
  - ◆ Save.
- Email or electronically transfer to the Department Preconstruction Engineer.

**Continue on the next page**

## **Department Preconstruction Engineer**

- Complete required process to approve request.
- If not approved, return to originator with comments.
- If approved, digitally sign. Click in the required Signature Field.
  - ◆ From “Digital ID” select your name. (Other names may be here if the same PC is being used by more than one person to digitally sign.)
  - ◆ From “Appearance” select “Digital Signatures” that you created above.
  - ◆ From “Reason” select “I am approving this document” or “I attest to the accuracy and integrity of this document” as desired.
    - The “Reason” option may not be available for those using Reader to sign.
  - ◆ Click “Sign” to Digitally Sign the form.
  - ◆ Save.
- Email or electronically transfer to FHWA as required

**Continue on the next page**

## **FHWA**

- Accomplish [“certificate and eToken set up”](#) and [“Adobe Initial”](#) actions starting on Page 2 if not already accomplished before continuing.
  - ◆ Skip if already accomplished
- If required “Save” the file from email or other method to desired location and open in Adobe Writer Pro 7, 8, or 9 or Adobe Reader 8 or 9.
- Click in the required Signature Field.
  - ◆ From “Digital ID” select your name. (Other names may be here if the same PC is being used by more than one person to digitally sign.)
  - ◆ From “Appearance” select “Digital Signatures” that you created above.
  - ◆ From “Reason” select “I attest to the accuracy and integrity of this document.”
    - The “Reason” option may not be available for those using Reader to sign.
  - ◆ Click “Sign” to Digitally Sign the form.
  - ◆ Save.
- Email or electronically transfer to the Department Preconstruction Engineer.

## **Department Preconstruction Engineer**

- Make required notifications and send final file as needed
- File original electronically and hard copy

## **Process Complete**